BEST PRACTICE GUIDE

DELIVER BUSINESS GROWTH WITH EMAIL



B2B Marketing

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Introduction

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Email is old. Really old – a lot older than the internet, in fact. But in my lifetime (and I suppose I count as a millennial) it's completely transformed the way we all communicate with one another. And it's gone from exciting (back in 1998) to annoying. This means it's now misunderstood as a tool in the marketing community, and I'd say this is especially the case in B2B.

Most people have a weird relationship with email. It's a highly functional tool (where is that confirmation for those train tickets?) but also an integral part of our lives, both at home and at work, particularly now that we can access emails across so many different devices. Our team at B2B has recently adopted a work messaging tool which has hugely reduced the number of emails we send across the team, and it's transformed the way we work and communicate. But when it comes to external communication – whether you're talking about work associates, clients or prospects, email still has a crucial part to play.

The problem is that it's easy to use email badly. And admittedly, getting it right is a huge challenge, particularly as the digital landscape transforms more quickly than you can empty your inbox. But there are things you can do to change the way you use email for the better, and ensure you're reaching the right people with the right message at the right time.

In the following pages, email expert Steve Kemish will guide you through the steps you need to take to ensure your email marketing strategy works right across the customer journey, and starts to deliver the business results you're looking for.



Email is here to stay

Steve Kemish

Managing partner
Junction Agency

Perspective is everything.

For many B2B marketers, email is increasingly seen as tired, old-fashioned and unable to deliver the results it once promised. It's often overlooked in favour of newer, shinier tools in the marketer's arsenal – if I've learnt anything from 20 years in the industry it's that we always tend to flock to the next big thing, especially if it's something that glitters and sparkles.

But email still refuses to go away.

This guide briefly gets to grips with why this is the case in the modern world of B2B marketing, and then focuses on the big email opportunities that remain. It'll also explore how marketers can adjust the use and timing of this marketing channel to fit in with, complement and support the many newer routes to market available.

Part of the problem with email marketing today is its perception; the fact it's old and not as innovative as other channels. But this is not necessarily a bad thing – as a mature channel, email's stable, well known and can be very cost effective.

But to ensure continued value and return from email marketing, it's important to think differently about how it's used and measured.

Happily, rather than turning out to be fierce competitors, the likes of social media, content marketing and marketing automation (MA) have all become extremely complementary to modern email marketing.

Social media offers amplification and magnification, content marketing provides the quality fuel email has long needed, and MA gives marketers myriad ways to apply email into the dips and gaps of a multichannel marketing programme.

View email marketing as a cement among bricks rather than a sledgehammer – mass broadcast arguably still has a place, but it's far better to work on a larger number of emails to smaller groups (persona-driven, ideally) and match these emails to the full marketing and sales cycle. This will help progress your target audience along at each stage.

Alongside the oft-used newsletter, think about messages that will help nurture and nudge, and don't be afraid to look to the wider marketing world for examples of best practice. B2C uses welcome emails, trigger emails (abandon baskets) and anniversary reminders at precisely the right times in order to deliver value to the recipient.

I. Data and the foundations

The adage of 'rubbish in, rubbish out' is never truer than with email marketing.

It's therefore essential that you start by looking at your data. Make sure you run an audit – modern email marketing is certainly quality over quantity, so not only do you need to look at how much data you have, but you have to understand its integrity. Later on, if you want to use personalisation, you must ensure your data collection practices are robust. The integrity of this effective method of one-to-one communication is undermined by inaccurate or badly formatted data (think about how you feel when you receive a Starbucks cup complete with a misspelt version of your name).

Plan for future segmentation

As well as determining integrity, an audit is a chance to fill in the gaps. Think about augmenting your database with useful additional fields of data to aid segmentation down the line.

Segmenting your data

Getting segmentation right is an art rather than a science, so look to sample a small subset of data first to check the overall improvement value you can achieve.

These additional fields are great segmentation axes:

- Standard industrial classification (SIC)
- Turnover
- Employees
- Previous purchase history (including dates)
- Job function and title
- Previous behaviour (opens, clicks, devices used)
- Location for regional activity (postcode or city)
- Sales/account manager name.

This list is endless, but try and focus on a core number of fields you know you can and will use. There's a temptation to collect too much – but not only does this increase the cost of the exercise, it also means generating even more data that will soon erode in quality. Research from Hubspot suggests the average database degrades by 25 per cent each year, so keep in mind the quality over quantity target.

II. Persona-based targeting

Once you've established a solid foundation of data, you can look at how to slice and dice this data to create smaller, more manageable and more meaningful groups to target.

> For more detailed guidance on creating personas, download our ***Beginners Guide to Buyer Personas.***

There are a number of ways to undertake persona-based marketing. Typically organisations will look to create industry or job-specific personas. But while this is a very useful starting point for any B2B organisation, you should also consider looking at two other overlays:

1. Behavioural targeting
2. Lifecycle mapping.

1. Behavioural targeting

First, look to identify a more emotionally focused set of characteristics – two recipients may look identical in terms of role, industry and seniority but may behave in entirely different ways. Think about how you can target the optimistic versus the cautious, and the high-volume content consumer versus the occasional opener.

Look to add previous activity insight into this work too. Can you identify segments of recipients based on common devices used? Can you find out what time they typically open your emails or, more broadly than that, when they tend to call you, visit your website or generally engage with your business?

It's also helpful to look at the most recent information you have. When did they last buy from you? What did they buy and how did they buy it? Did they purchase online or over the phone? There will be helpful hints across your business that give you a chance to build a persona set; these will allow you to start talking to smaller lookalike groups and increase the likelihood of your messages being relevant.

2. Lifecycle mapping

Look at how you map your sales cycle to this work. There are many different methods of displaying each stage but for the purpose of this guide, let's use a simple and well-established marketing model: AIDA.

Awareness
Interest
Desire
Action

Thinking about types of email message and the timing for each in conjunction with these four broad stages is a great place to start. But you should also think about the role of email within other departments (such as sales), and where they may take the prospect or lead.

Then look beyond this model. What happens when you do complete the action? If the above approach is centred on acquiring a new customer or sale, what can email do next?

You then need to look at potential gaps in the process – what happens when a lead is passed to sales and that lead doesn't convert? Email can be excellent for nurturing or keeping warm any opportunities that aren't yet ready to be closed.

Welcome and incentivise

Welcome emails are under-used by many organisations. Along with confirmation emails (be that for orders, event tickets or data) they're timely and tend to achieve high engagement rates. Harness these messages to set the tone and relationship with your audience. Incentives can also be delivered effectively via email. If you can offer discounts or free extras, use email to inspire a reaction and create a sense of urgency. If you sell services that don't allow for this level of simplicity, look at the use of testimonials, how-to guides or case studies; these may be the elements that help nudge that recipient or set of recipients along to the next stage.

III. Mapping customer touchpoints

As we have just discussed, you should look to map your marketing and sales cycle (and recognise that it may well be different for customers compared to prospects or for one product type compared to another), but it's also important to look at how you involve the wider business.

Where can email help others (sales, customer service, events) to deploy timely messages to their audiences? And where can these teams and touchpoints be primed to capture the data needed to start the email marketing journey for customers?

CRM systems allow you to capture data at different points, but you need to make sure relevant teams are trained, incentivised and aware of why and how their data capture can help the overall business.

Borrow from the best

Industries that have traditional renewal or subscription models – software, insurance and publishing, for example – have spent many years working out the optimum time plan for maximising the renewal percentage. Look to benchmark yourself against the best-of-breed (previous B2B Marketing Awards winners, for example) and look to lift or borrow the methods they've used. Benchmarking isn't theft, but don't assume what works for them will work the same for you – test and cherry-pick the best-performing elements of each company's approach.

IV. Getting your content right

Once you've figured out how email can play a part across the customer journey, the next stage is creating emails with content that will engage your audience.

Dynamic content

Email marketing software has an ever-increasing array of features, and numerous buttons, bells and whistles that can help a marketer achieve the results they're after.

One of the more powerful tools within this arsenal, which a wide range of service providers offers, is dynamic or conditional content.

Arguably an early predecessor of MA, this technique allows you to create a series of rules against one email campaign that will dynamically create and send multiple variants of the original message. A simple method would be to add personalisation to the first line – the overused (in this author's opinion) 'Dear Mr Kemish', for example.

But this method allows for far greater sophistication. As long as you hold robust data (see page 4) you can set a series of rules that mean each element of the email (be that text, images or both) can be altered based on the corresponding data record.

Here are a few simple examples of how this can be harnessed:

- Change the main body image based on previous purchase history
- Change the opening paragraph for customers and prospects
- Display the closest venue/location for a series of events based on the recipient's postcode
- Show the sign-off name and contact details for your organisation's account manager.

Like MA, which essentially allows you to create a series of rules and conditions that then affect the corresponding messages, the dynamic content approach can be labour intensive. But it's well worth the effort.

Look to start small; test this method on one or two emails or segments and be prepared to learn. The art of testing is about doing it as much as you can. Don't expect every test to improve the result, but know that every test does take you a step closer to the optimum approach.

» In a busy world where we receive a high volume of competing marketing messages every day, it's vital that your marketing stands out «

Tone and language

Ok, I'll say it. Too much B2B marketing communication is boring. And as somebody with 20 years of experience, I'm happy to admit this.

But it needn't be.

Often the challenge with marketing and, in this case, email, is finding the right tone and hook to draw attention. In a busy world where we receive a high volume of competing marketing messages every day, it's vital that your marketing stands out.

This isn't necessarily about sensationalism or surrealism for the sake of attention, but instead a series of more subtle and powerful changes.

Firstly, tone of voice – does your business have tone of voice guidelines? If not, why not? Think about how you should talk to your customers. It's not necessarily about being technical but also about coming across as warm and human.

This is where the use of 'Dear' as a salutation hurts. When your email marketing recipients receive other emails from an account manager in your team, do they start their message with 'Dear'? Or do they say 'Hi'?

Ensure you match your email marketing to the wider communications style your colleagues use – something as simple as 'Dear' can clash with your wider marketing message and encourage your recipients to click 'delete'.

Make sure you're not only taking on a more personable tone, but that you're talking more about them than you. Perhaps audit your previous emails to flag those that talk about you (or your products) versus the responses and what they might want or need. Seldom do we as humans buy on features and benefits; instead it's about usage cases and how particular products or services make our lives easier.

V. Top 10 tips for design and delivery

1. Know your market

The email marketing audience can be broadly split into two categories: desktop and mobile. Confusingly, a tablet device can sometimes fall into one or other of these pots, or occasionally form a third group. Either way, ensure you start to measure the percentage of recipients in each group. This helps ensure you're optimising the design for the right audience; in lieu of any email reporting on this, look at your broader website analytics for a view on the percentage of mobile versus desktop traffic.

But before you start to use this insight to form a segment, remember that much of your audience uses multiple devices, so don't assume an open on a mobile device will happen every time; an individual may well use their desktop or laptop next time.

2. Go responsive

If you want to solve the conundrum above, you could take a look at responsive design. Re-engineering your email templates to ensure the underlying code will flex to give the best user experience for multiple devices can be a worthwhile investment. While it can be painful and time-consuming, and such templates can sometimes be more restrictive than older non-responsive emails, the benefits will outweigh the drawbacks in no time.

3. Don't ditch the desktop just yet

Even if you have no primary data to confirm this, it's a pretty safe bet to assume you have mobile traffic for your emails already and this will only grow. But don't believe all the hype; there are many benchmarking reports across the wider email marketing industry that show the likes of Microsoft Outlook as lesser-used email clients. This is typically the case when you aggregate B2C and B2B reporting, but be careful – Outlook is still the workhorse of many businesses so will be a key email client. Make sure your design also supports this audience.

4. Make it easy

The usability guru Steve Krug includes a quote from his wife in his seminal book *Don't Make Me Think,* which can be paraphrased:

"If something is easy to use, I use it more often."

This is so important for email marketing in terms of ensuring the primary call-to-action (CTA) of each of your emails is really clear. Fall-off-a-log clear.

Test the location, size and colour of your CTAs – they're the most vital part of the message, so ensure you work to understand what drives the best click rate.

5. Timing

'Tuesday afternoon' has long been the answer I've given to the question 'When's the best time to send emails?' – but I'm not sure the reason for it!

Unfortunately, there's no silver bullet here. No report will give you this insight, and only by looking within will you be able to identify this. Ensure you test different days and times of day – mobile device usage has changed the typical daily pattern of many email recipients, so watch out for this.

Also ensure you map your sends against your broader business operations. Don't send when your call centre is closed or about to close – instead, try and understand peak patterns from the telephony logs of your support and sales team, and again look at web analytics for clues around busy times for your website.

6. Images – less is more

One of the biggest reasons that legitimate emails end up in junk, or are treated as spam, is the image-to-text ratio. Images are a great way to get a message across, but sadly email clients will often view these with caution because spammers so regularly over-use them.

A simple rule here is to use text where you can – don't make headlines an image. Ensure you educate your email designers so they know about this challenge.

7. Embrace the small print

A brilliant way to maintain the use of images in your emails is to add further small print to the footer. It's common to see this area on nearly all emails. Users often simply look for the 'unsubscribe' button in this area; rarely is it actually read. So harness this insight and add an extra paragraph of information there – make sure it's meaningful, but know its primary goal is to help balance the use of images in the rest of that message.

8. Enter the golden triangle

Without an open, the best-looking email in the world is redundant, so it's vital to spend time testing the area that most affects an email being opened. The three pillars of this are often collectively referred to as the 'golden triangle' of email marketing.

The sender name, subject line and preview pane (the part of the message your email client shows you before opening) have the greatest impact on whether you achieve an open or a deletion.

Test different names; aim for one that's most relevant to each audience and don't let opinion get in the way of fact. Test all three to gauge the optimum.

» It's vital that you ensure the full journey is mapped out in the best possible way «

9. Don't forget the landing page

You may have sent the perfect email to the perfect list at the perfect time, but what happens after they click? Rarely is success just the open or the click, so it's vital that you ensure the full journey is mapped out in the best possible way. Your landing page is the next place users will look – is this easy to use? Is it in keeping with the email that went before it in terms of both design and tone? Lavish this page with as much love and attention as the email itself.

10. Keep it real (time)

There's now a wave of technology providers that help you bring real-time dynamic content to your emails. The likes of Movable Ink, LiveIntent and Liveclicker are among many that allow you to pull in third party real-time content (think the latest weather forecast for the area you're travelling to) to help you differentiate and stand out in their inbox.

VI. Measuring success

Focus on the journey, not the click.

It's really easy to become micro-focused on your email marketing success. But remember that an open or a click is just the start. Ensure you're measuring the longer game and look to measure and report throughout the whole sales journey.

You should also think about different tiers of reporting; campaign metrics like opens and clicks are great when it comes to measuring one email's success versus another's, but they're not right for KPI packs or management reports. Taking a business-centric approach ensures the overall value of the campaign is clear.

Campaign metrics: The day-to-day stuff

- Opens (the number of people who open and read your email)
- Clicks (the number of people who have opened your email and clicked on trackable links within it)
- Timings
- Unsubscribes (the number of people who unsubscribed from your list)
- Delivery rates (the number of emails delivered to recipients' inboxes)
- Bounce rates (the number of emails that were returned by a recipient mail server – the opposite of delivery rates).

Key performance indicators (KPIs)

These will allow you to measure the wider business success of your email campaigns.

- Conversion to leads
- Return on investment (ROI)
- Testing – reduction in spend (on email marketing or other channels)
- Cost per lead/sale
- Average sale for 100/1000 records (great for working out the value of a database size)
- Sales uplift
- Reduction in lead time/customer service time
- Conversion rate (from email to order).

Key takeaways

Evolution, not revolution, is the order of the day for B2B email marketing.

- Rather than looking for the next big thing, think instead about maximising the potential of what this long-established marketing channel can offer. And instead of seeing email as a competitor to the likes of social media, look at how email can support and aid these other channels.
- Technology underpins a lot of modern marketing and email is no exception. MA affords us a real chance to take the back-breaking work of campaign deployment into a multichannel world. But tread carefully. To get MA to work you'll need time and patience, and both of these tend to come at a price.
- After you've audited your current position, look to build test programmes to prove a concept. The hard work for MA is upfront – the planning and the creation of the various workflows or rules that will ultimately automate the customer journey.
- Humans are rarely predictable, so try and build the most obvious and common rules rather than trying to capture every possible scenario; the latter approach will quickly cost you far too much time and effort in relation to reward.
- Instead, try to see MA as an opportunity to better target and use your email marketing in the broader customer journey.
- Above all else, **aim to constantly improve what your email marketing achieves.** Where overall response rates are declining, think about how to buck this trend, improve results and help rationalise or reduce costs elsewhere (but remember that results are business measures and not just opens and clicks). Think about how you can make your email marketing more helpful; more helpful to the recipients but also more helpful to your wider business. Where can it be plugged in to nurture and nudge customers and reduce burden on the business functions around you?



Author biography

Steve Kemish

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Steve is a multi award-winning marketer who has worked in digital marketing since 1997. As well as working client-side, he's also helped grow a leading email service provider, consulted to numerous clients on email and broader digital strategy, and played a part in building one of the most respected and awarded B2B marketing agencies in the UK.
Steve has worked with the likes of npower, Skype, ITV, Motorola, Oracle, Lego and British Airways in both the B2C and B2B arenas. He has been sending (and receiving) email marketing since the last century and spends his time teaching, speaking and writing on the subject.

As well as being a leading trainer for B2B Marketing, he's also email editor-in-chief for the IDM and speaks around the world, aiming to enthuse and inspire fellow marketers as he goes. Steve's also a guest lecturer at various universities, sits on the IDM digital marketing council and is a long-standing judge at Superbrands.

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About B2B Marketing

B2B Marketing

B2B Marketing is the comprehensive information resource for B2B marketers. Its mission is to provide practitioners with the information they need to perform better and achieve more, whatever sector of the B2B space they are operating in.

Launched in 2004 as *B2B Marketing* magazine, it has since evolved into a multi-faceted resource, delivering a broad range of content in a variety of different forms and formats.

Its key products are:

- Online community
- Magazine
- Awards
- Research and reports
- Training
- Events
- Membership.

For more information on any of these products or services go to b2bmarketing.net or call +44 (0)20 7014 4920

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